



Transfer Monitoring List

Purpose of this page

The Student Monitoring Detail page displays detailed transfer monitoring student information that can be updated or deleted.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to interpret the Transfer Monitoring List

The Transfer Monitoring List information is defined as follows:

- **SSN**—The student's Social Security Number. (The blue numbered icon next to the SSN will change with sorting. If you click the icon, it will take you to the Transfer Monitoring Detail page for that student. If a student has had an Alert sent from the NSLDS, there will be an Alert icon displayed next to the SSN.)
- **Name**—The student's name. (The Transfer Monitoring List by default is displayed in alphabetical order by last name, but you can change how the list is sorted.)
- **Enrollment Begin Date**—The date on which the student is expected to, or did begin classes at the school.
- **Monitor Begin Date**—The date on which NSLDS began monitoring the student.
- **Last Changed By**—The name of the user who last changed the student's record, or the name of the user who added the student to the list.

How to retrieve a sorted/filtered Transfer Monitoring List

To sort/filter and retrieve a Transfer Monitoring List:

1. In the **Sort By** list, click the sort criteria.
2. In the **Display Only** boxes, type in the display criteria that you wish to view.
3. Click **Retrieve** to view the sorted/filtered list.

Notes:

- The Add Student to Monitor List button at the top of the page will take you to the Student Monitoring Add page when you click it.
- If a student was added/updated via a batch file, the Last Changed By will read Batch.

Last updated: July 1, 2001

close

Student Monitoring Add

Purpose of this page

The Student Monitoring Add page allows you to add a student to the Transfer Monitoring List. If the user is adding a student to the Transfer Monitoring List who is not in the NSLDS database, the student will only be added to the Transfer Monitoring List and will not display on any other pages in the NSLDS FAP site.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to add a student to the Transfer Monitoring List

1. In the **SSN** box, type the student's Social Security Number. (The SSN appears automatically if you linked from the Loan or Pell Grant History pages.)
2. In the **First Name** box, type the student's first name. (The First Name appears automatically if you linked from the Loan or Pell Grant History pages.)
3. In the **Last Name** box, type the student's last name. (The Last Name appears automatically if you linked from the Loan or Pell Grant History pages.)
4. In the **Date Of Birth** box, type the student's date of birth. (The Date of Birth appears automatically if you linked from the Loan or Pell Grant History pages.)
5. In the **Enrollment Begin Date** box, type the date on which the student is expected to, or did begin classes at the school.
6. In the **Monitor Begin Date** box, type the date on which you want NSLDS to begin monitoring the student. The current date will appear by default, although the date can be changed.
7. Click **Submit**.

Last updated: July 1, 2001

close

Student Monitoring Detail

Purpose of this page

The Student Monitoring Detail page displays detailed transfer monitoring student information that can be updated or deleted.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to interpret the Student Monitoring Detail

- **SSN**—The student's Social Security Number.
- **Name**—The student's current name in the NSLDS. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the name will display as provided by the school user.
- **DOB**—The student's date of birth. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the DOB will display as provided by the school user.
- **Enrollment Begin Date**—The date on which the student was reported to begin classes at the school.
- **Monitor Begin Date**—The date on which the NSLDS began monitoring the student.
- **Last Changed By**—The name of the user who added or last changed the student information.

How to update or delete the Student Monitoring Detail

- To update or delete the Student Monitoring Detail information, click **Update** or **Delete**.

Note: If a student was added/updated via a batch file, the Last Changed By will read Batch.

Last updated: July 1, 2001

close

Student Monitoring Update

Purpose of this page

The Student Monitoring Update page allows you to update the Enrollment Begin Date and/or the Monitoring Begin Date for student's Transfer Monitoring Detail information.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to update Student Monitoring Detail

1. Type the new **Enrollment Begin Date** and/or the new **Monitoring Begin Date** in the respective box(es).
2. Click **Submit**.

Notes:

- If you are updating the Monitoring Begin Date to a date in the future, it cannot be later than the Enrollment Begin Date.
- After clicking Submit, your name will appear in Last Changed By until the record on the Transfer Monitoring List is changed again.

Last updated: July 1, 2001

close

Student Monitoring Delete

Purpose of this page

The **Student Monitoring Delete Confirmation** page allows you to delete the student from the **Transfer Monitoring List** page. Student Monitoring records should only be deleted if the student will not be attending your school, or the student was added to your school's list in error. Do not delete a student simply to stop monitoring him or her. Once the delete has been confirmed, the student's information will be removed from the Monitoring and, if applicable, Alert lists. It does not delete him or her from the NSLDS database.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to delete the student from the Transfer Monitoring List

To delete the student from the Transfer Monitoring List, read the Delete Confirmation statement, then click **Confirm**.

Note: If a student was added/updated via a batch file, the **Last Changed By field** will read **Batch**.

Last updated: July 1, 2001

close

Monitoring Alert Review

Purpose of this page

The Monitoring Alert Review page lists all transfer students on a school's Transfer Monitoring List to which changes have been reported.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to interpret the Monitoring Alert Review

- **Monitoring Results as of**—The date on which the Transfer Monitoring Process last ran.
- **SSN**—The student's Social Security Number.
- **Name**—The first and last name of the student.
- **DOB**—The student's date of birth.
- **Change**—The type of change reported on the student's record. If new information was reported on a student's loan, **Loan** will appear in the text box. **Loan** is a link to the Loan Detail page of the loan that had a change reported. If new information was reported on a student's Pell Grant, **Pell** will appear in the text box. **Pell** is a link to the Pell Grant History page for this student.
- **Reviewed**—Indicates to other users at your school that this information was reviewed. Clicking the check box and then clicking **Submit** indicates that you have reviewed the Change immediately to the left of the box. The check boxes determine whether the change information is listed in the top section of the list or the section following.
- **Date Alerted**—The date on which the NSLDS alerted the school of the change to the student's record.
- **Enrollment Begin Date**—The date on which the school reported that the student is expected to, or did begin classes at the school.
- **Monitor Begin Date**—The date on which the NSLDS began monitoring the student.

How to retrieve a sorted/filtered Monitoring Alert Review List

To use **Sort By** and **Display Only** at the top of the page:

1. In the **Sort By** list, click how the list should be sorted. The default sort is Non-reviewed records in alphabetical order by last name, then Reviewed records in alphabetical order by last name.

Options include: SSN, Date Alerted, Enrollment Begin Date, and Monitor Begin Date.

2. In the **Display Only** boxes, type the information that you wish to view.
3. Click **Loans Only** or **Pell Only**, if you wish to view only one type of Alert information.
4. Click **Retrieve** to view the sorted/filtered list.

To re-order the list by **Reviewed** check boxes selected, click **Submit**.

Notes:

- Clicking the link in the Change box will not automatically place a check mark in the Reviewed box. To place a check mark in the Reviewed box when reviewing online, you must manually click it and then submit.
- If the school designated that Alerts be sent via Web and Batch, those records sent in the batch Alert file will automatically have check marks in the Reviewed boxes.
- The Monitoring Alert Review page can be viewed without accessing the student's record to view the change reported. The Batch Alert file cannot be viewed without reviewing the change information because it is the batch file.

Last updated: July 1, 2001

close



School Transfer Profile

Purpose of this page

The **School Transfer Profile** page displays information about the school contact for the Transfer Monitoring process. This page shows how your school is set up to submit Inform files and receive Alert notifications. This information is provided and updated by school users, and must be completed prior to submitting your school's first Inform.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to update the School Transfer Profile

To update the School Transfer Profile information:

1. Click **Update** at the top of the page.
2. The School Transfer Profile Update page appears.

How to interpret the School Transfer Profile

The **School Transfer Profile** information is defined as follows:

- **First Name** —The first name of the school's contact.
- **Last Name** —The last name of the school's contact.
- **Title** —The title of the school's contact.
- **Phone** —The phone number of the school's contact.
- **E-Mail** —The e-mail address provided by the school to receive Alert notification messages, which could be set up at the school as a group e-mail.
- **Inform** —The designated batch SAIG mailbox for the School, Servicer, or Central Administration Office. This may appear blank if the user is not using a batch interface (via the SAIG mailbox) and only wishes to use the Web. For example, many smaller schools do not have a batch interface and only use the Web.
- **Transfer Monitoring Servicer** —The servicer that is responsible for receiving and/or sending the Transfer Monitoring information for a school. This indicates whether the school uses ('Yes') or does not use ('No') a Transfer Monitoring Servicer.
- **Alert** —Indicates how the school requested its Alert to be sent (Web Only or Web and Batch).
- **SAIG Mailbox** —The designated SAIG mailbox for Alerts. A TG number displays, which indicates that the school has designated Web and Batch as its output option for Alerts. This appears blank if the

school designated Web Only.

- **Batch Alert Method** —If the school requested Web and Batch Alerts, in addition to providing a SAIG mailbox number, the school must select an Alert format. Extract indicates that the school requested the Alerts as a data file; Report indicates that the school requested the Alerts be in a Report format. If this field is not present, the school designated Web Only.
- **Last Update By** —The name of the user who last updated the school's Transfer Profile, and the date of that update.

Last updated: March 15, 2002

close

School Transfer Profile Update

Purpose of this page

The School Transfer Profile Update page allows you to update the School Transfer Profile information.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to update the School Transfer Profile

To update the School Transfer Profile:

1. In the **First Name** box, type the first name of the school's contact.
2. In the **Last Name** box, type the last name of the school's contact.
3. In the **Title** box, type the title of the school's contact.
4. In the **Phone** and **Ext** boxes, type the phone number and extension of the school's contact.
5. In the **E-Mail** box, type the e-mail address designated to receive Alert notification messages, which could be set up at the school as a group e-mail.
6. In the **Inform** box, type the TG number for the **Designated Batch SAIG Mailbox for School, Servicer, or Central Administration Office (Optional)**. You may leave this blank if you are not using the batch interface (via the SAIG mailbox) and only wish to use the Web.
7. In the **Inform** (Is this your Servicer for Transfer Monitoring?) check box, click to indicate **Yes** or **No**.
8. In the **Alert** check box, click how you want your school's Alert information to be sent (**Web Only** or **Web and Batch File**). If you click Web and Batch File, type the TG number in the **SAIG Mailbox for School, Servicer, or Central Administration Office** box.
9. In the **Alert** (Is this your Servicer for Transfer Monitoring?) check box, click to indicate **Yes** or **No**.
10. In the **Batch Alert Method** check box, click an Alert format: **Extract** or **Report**. Extract indicates that you want Alerts as a data file; Report indicates you want the Alerts in a report format. If you clicked Web Only as the Alert, leave the Extract and Report check boxes blank.
11. Click **Submit**.

In Last Update By, the name of the user who last updated the School Transfer Profile and the date of the last School Transfer Profile update appear.

Last updated: March 15, 2002

close



School Transfer Profile Add

Purpose of this page

The School Transfer Profile Add page allows you to add School Transfer Profile information. You must complete this page before initiating the Transfer Monitor process.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

How to add a School Transfer Profile

To add a School Transfer Profile:

1. In the **First Name** box, type the first name of the school's contact.
2. In the **Last Name** box, type the last name of the school's contact.
3. In the **Title** box, type the title of the school's contact.
4. In the **Phone** and **Ext** boxes, type the phone number and extension of the school's contact.
5. In the **E-Mail** box, type the e-mail address designated to receive Alert notification messages, which could be set up at the school as a group e-mail.
6. In the **Inform** box, type the TG number for the **Designated Batch SAIG Mailbox for School, Servicer, or Central Administration Office (Optional)**. You may leave this blank if you are not using the batch interface (via the SAIG mailbox) and only wish to use the Web.
7. In the **Inform** (Is this your Servicer for Transfer Monitoring?) check box, click to indicate **Yes** or **No**.
8. In the **Alert** check box, click how you want your school's Alert information to be sent (**Web Only** or **Web and Batch File**). If you click Web and Batch File, type the TG number in the **SAIG Mailbox for School, Servicer, or Central Administration Office** box.
9. In the **Alert** (Is this your Servicer for Transfer Monitoring?) check box, click to indicate **Yes** or **No**.
10. In the **Batch Alert Method** check box, click an Alert format: **Extract** or **Report**. Extract indicates that you want Alerts as a data file; Report indicates you want the Alerts in a report format. If you clicked Web Only as the Alert, leave the Extract and Report check boxes blank.
11. Click **Submit**.

When adding a School Transfer Profile, keep in mind the following:

- After the School Transfer Profile has been added, your name and the date appear on the School Transfer Profile page in Last Update By.
- If you attempt to add a student to your school's Transfer Monitoring List via batch file before completing this page, NSLDS sends back an error file. If you attempt to add a student to your school's Transfer Monitoring List via this Web site before completing this page, you are re-directed to this page.
- This page only displays once. After this page is completed, use the School Transfer Profile Update

page to make any updates.

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close